

MONTHLY ANALYSIS OF INDUSTRY EMPLOYMENT DATA  
New Hampshire, September 2003  
B G McKay

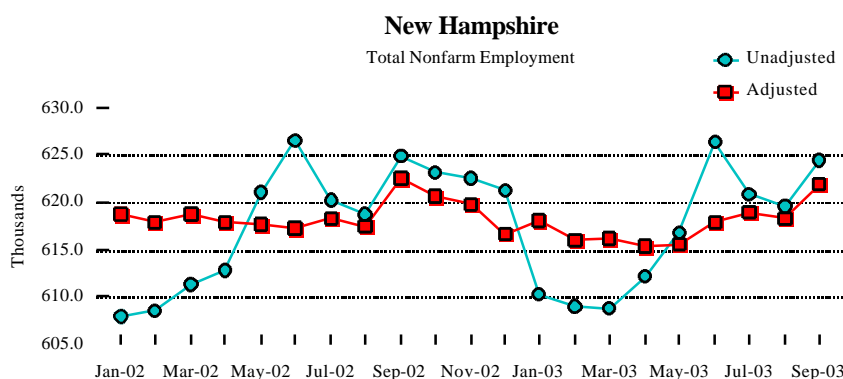
**NOTE:** The Bureau of Labor Statistics (BLS) says, “For purposes of analysis, the BLS has further aggregated NAICS sectors into groupings called ‘Supersectors’. The Current Employment Statistics (CES) program will publish data for these supersectors as well as sectors and detailed industries. Also, the aggregations to Goods-Producing and Service-Providing industries will be retained. The CES program will continue to classify all publicly owned establishments in government.”

For more information on the CES conversion to NAICS, see our web site,  
<http://www.nhes.state.nh.us/elmi/pdfzip/econanalys/articles/2002/NAICS.pdf>.

**Seasonally Adjusted:** New Hampshire’s total nonfarm employment grew by 3,500 jobs according to September’s seasonally adjusted estimates. Of the published seasonally adjusted estimates, trade, transportation, and utilities (supersector 40) led the way with a 2,000-job increase. Government (supersector 90) employment expanded by 1,200 jobs in September 2003, and leisure and hospitality (supersector 70) added 600 jobs during the month.

Not all supersectors in this series posted gains. Manufacturing (supersector 30) dropped 500 jobs from the rolls, and construction (supersector 20) trimmed its ranks by 100 jobs.

**Unadjusted:** September was a notable month for some supersectors in terms of seasonal activities, as total nonfarm employment increased by 4,800 jobs in the unadjusted data series.



Traditionally, the start of another school term is one of the more significant events in September, which had a large influence on 10,600-job increase in government (supersector 90) for September 2003. Following the public sector’s lead, educational and health services (supersector 65) augmented its work force by 1,000 jobs. Trade, transportation, and utilities (supersector 40) added 500 jobs during the month.

The start of the school term signaled the end of the peak travel and tourism season. A 5,300-job drop in leisure and hospitality (supersector 70) verified the completion of that season.

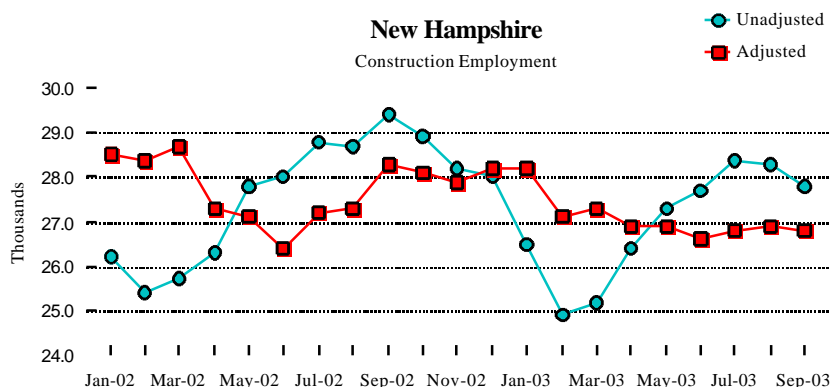
Construction (supersector 20), manufacturing (supersector 30), and other services (supersector 80) each pared back its respective force by 500 jobs. In these instances, there were traces of seasonal activities that dictated the reduction.

To round out the downside, supersector 50, information, and supersector 60, professional and business services, each saw its employment level decline by 100 jobs in September.

Natural resources and mining (supersector 10) sustained employment at the previous month’s level.

## CONSTRUCTION

Construction (supersector 20) saw employment decline by 500 jobs in September’s unadjusted estimates.



According to the sample, new single-family housing construction (industry 236115) firms played a large part in the decline. Commercial and institutional building construction (industry 236220) firms contributed to the reduction at a lesser rate.

Further, heavy and civil engineering construction (subsector 237) also contributed to September's downward turn.

Not all sectors in construction experienced contractions in September. By the most recent estimates special trade contractors (subsector 238) brought 300 additional workers on board. The sample indicated that plumbing, heating, and air conditioning (industry group 238222) encountered an increase in demand for services.

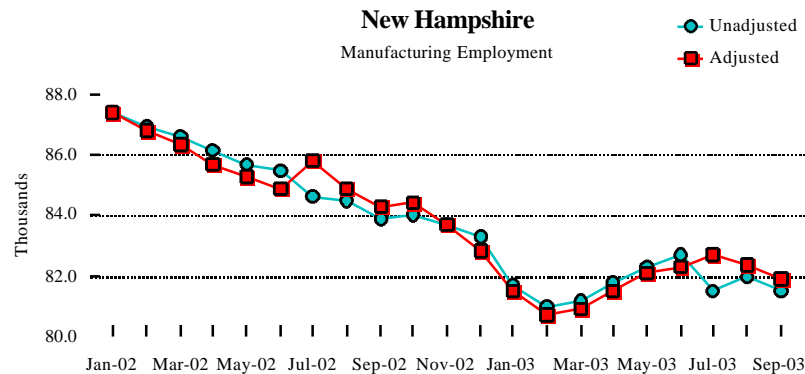
## MANUFACTURING

Preliminary unadjusted estimates for September showed that manufacturing's (supersector 30) employment level declined by 500 jobs. Those 500-jobs came from the durable goods subdivision of the supersector.

Semiconductor and other electronic component manufacturing (industry group 3344) was the only published item to show change, as this industry dropped 100 jobs in September.

A review of September's sample indicated that durable goods manufacturing's overall decline was widely dispersed over many of the subsectors within the division.

In contrast to durable goods' published data, nondurable goods manufacturing showed no change in employment at the division level, while paper manufacturing (subsector 322) expanded its ranks by 100 jobs.

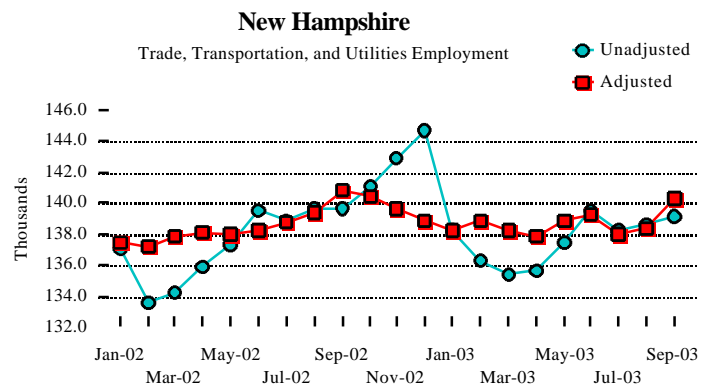


## TRADE, TRANSPORTATION, AND UTILITIES

Supersector 40, trade, transportation, and utilities added 500 jobs to the state's economy in September. For the most part, those 500 jobs could be found in the retail trade (sector 42) area. A 100-job drop in wholesale trade (sector 41) offset the 100-job gain in transportation, warehouse (sector 43), and utilities (sector 22).

Merchant wholesalers (subsector 423) accounted for the 100-job drop in wholesale trade, as employment in wholesale electronic markets and agents and brokers (subsector 425) stayed at the previous months level.

In turning to retail trade, health and personal care stores' (subsector 446) 100-job increase was the only published item in the sector to register a change.



Clothing, accessories, and general merchandise stores' (subsectors 448 and 452 combined) and food and beverage stores (subsector 445) each trimmed 300 jobs from their rosters in September. The estimates showed that grocery stores (industry group 4451) actually reduced its ranks by 400 jobs.

Transportation and warehousing (sector 48-49) had 200 fewer workers on the job in September, while utilities (sector 22) mitigated the decline by adding 100 jobs to its payrolls. Transportation's decreased employment level resulted from declines in elements related to tourism outweighing gains in school bus transport.

## **INFORMATION**

September's preliminary estimates showed that employment in information (supersector 50) declined by 100 jobs. The sample indicated that elements in broadcasting (subsector 515) were the primary force behind the reduction.

Employment in newspaper, periodicals, book and directory publishers (subsector 511), the only published subsector of information, remained unchanged in over-the-month activity.

## **FINANCIAL ACTIVITIES**

Supersector 50, financial activities, experienced a 300-job decline in September's preliminary estimates.

Finance and insurance (sector 52) employment accounted for 200 of the 300 jobs. Insurance carriers and related activities (subsector 524) absorbed one-half of the sector 52 losses.

To complete the September picture for this supersector, real estate and rental and leasing (sector 53) took a 100-job cutback.

## **PROFESSIONAL AND BUSINESS SERVICES**

The employment level in professional and business services (supersector 60) declined by 100 jobs in September's unadjusted estimates.

Inside the supersector, professional, scientific, and technical services (sector 54) incurred a 200-job setback and management of companies and enterprises (sector 55) reduced its staff by 100 workers.

Administrative and support and waste management and remediation services (sector 56) offset some of the previously mentioned job loss with a 200-job increase. From published data, it appeared that the sector 56 increased number of jobs could be found in employment services (subsector 561).

## **EDUCATION AND HEALTH SERVICES**

The start of another school year played a significant role in September's 1,000-job increase in educational and health services (supersector 65). Employment in educational services (subsector 611) overall grew by 1,000 jobs in the unadjusted estimates for September. Along with faculty and students returning to school and their work-study programs, employment in colleges, universities and professional schools (industry group 6113) expanded by 2,300 jobs during the month.

A 600-job drop in health care and social services (sector 62) somewhat negated employment gains in educational services.

Ambulatory health care services (subsector 621) contributed 200 jobs to the September downturn. The sample suggested that offices of dentists (industry group 6212) were instrumental in that decrease.

Hospitals (subsector 622) in the state reduced their work force by 100 jobs in September, while nursing and residential care facilities (subsector 623) held employment steady at the August level.

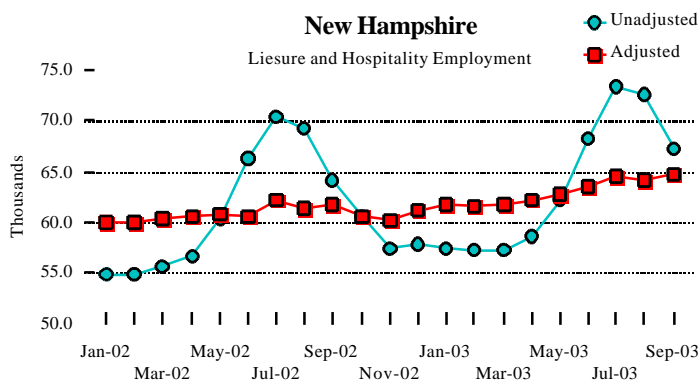
## **LEISURE AND HOSPITALITY**

The completion of another season of travel and tourism was emphatically marked with a 5,300-job reduction in leisure and hospitality (supersector 70) in September's unadjusted estimates. Arts, entertainment, and recreation (sector 71) pared back 1,500 jobs, as employment in accommodation and food services (sector 72) fell by 3,800 jobs.

Within sector 71, Amusement, gambling, and recreation industries (subsector 713) provided 1,400 jobs to the 1,500-job decline.

Accommodation (subsector 721) accounted for 2,000 of the jobs dropped in the seasonal decrease, while food services and drinking places (subsector 722) absorbed the remaining 1,800 jobs lost.

Employment in full-service restaurants (industry group 7221) fell by 900 jobs, and limited-service eating places (industry group 7222) chopped 800 jobs from its payrolls.



## OTHER SERVICES

The sample showed those firms doing business in personal and laundry services (subsector 812) provided a majority of the stimulus behind the 500-job tumble in September's preliminary estimates for other services (supersector 80). Also, the sample indicated that the downward pressure exerted by subsector 812 was eased by increases in religious, grantmaking, civic, professional, and similar organizations (subsector 813).

## GOVERNMENT

September's published estimates for government (supersector 90) showed an increase of 10,600 jobs. At the top end levels, the federal and state echelons of government remained unchanged from the August level. Local government accounted for the movement in the supersector.

Estimates for state government employment showed that an increase in educational services was directly offset by a reduction in employment levels in the other administrative functions area. State parks traditionally reduce operations in September.

Educational services in local government supplied the driving force for the overall increase in total government employment in New Hampshire. As with state government, the parks and recreation department wrapped up operations for the summer season, which resulted in a reduction of employment level for the non-educational portions of local government.

